Widget Title	Description
ACHECK Maintenance	The ACHECK Maintenance widget provides the ability to maintain ACHECK records
Adjustable Loan	New in Release 19F. Supports the creation and maintenance of Pending Adjustable Rate Loan Changes.
Agency Reporting/GNMA Reports	Generate GNMA Reports and run WHFIT modules in Strategy's Portal
Appraisal	Strategy application to track Appraisals historically for a collateral property. New to the Portal in Release 20, this widget replaces the Appraisal tab in Strategy's desktop application.
Billing	The Billing widget supports single log in integration between the Strategy's browser-based application and the Strategy desktop user interface. As of Release 20, this widget will open the desktop user interface in the Billing module.
Bonds	The Bonds widget supports the tracking and redemption of Bonds associated with Strategy loans.
BuildRite	Strategy's BuildRite widget provides access to Strategy's application to track and easily report on detailed construction budget information throughout the life of the project.
Collateral	The Collateral widget provides access to the collateral module allowing for maintenance and viewing of collateral and building information.
Compounding SOFR Interest	The Compounding SOFR widget displays accrual details for loans that are compounding interest in arrears.
Contact Log	The Contact Log is an extension of Notes and allows for quick recording of contact history and other relevant information
Delinquent Loans	The Delinquent Loans widget displays information regarding any loan where the loan payment has not been received by the due date.
Document Checklist	The Document Checklist allows for the tracking of collectibles.
Environmental	The Environmental widget tracks historical information about Environmental Reports for a collateral property. Replaces the Environmental tab in the Asset module of Strategy's desktop interface.
Escrow	The Escrow widget supports single log in integration between the Strategy's browser-based application and the Strategy desktop user interface. As of Release 20, this widget will open the desktop user interface to the Escrow Processing module.
FEMA Disaster Information	Real-time feed from FEMA's disaster coverage compares the portfolio to disaster declarations to assist with monitoring exposure
File Uploader	Upload and maintain files in the Internal File System (IFS).
Financial Statements	The Financial Statement widget provides access to the Financial Statement Analysis Tool. This tool uses financial form driven financial statements to enter, spread, analyze, and create

	investor reports using historical data entered into the application.
Financial Statement Form Maintenance	Create and maintain financial statement form types for use with the Financial Statement Analysis Tool.
Hyperlink	The Hyperlink (URL) Widget allows users to define a short cut to external web sites. Users can assign multiple versions of this widget to their Portals, each referencing different sites.
Incoming Wire Queue	The Incoming Wire Queue widget is used to manage the application of incoming payments.
Inspections	The Inspection widget tracks historical inspection information including O&M plans, Repairs, and Health and Safety issues.
Insurance	The Insurance widget captures and maintains historical insurance policies and coverages. Works with Rules Engine to review coverages for compliance.
Investor	The Investor widget supports single log in integration between Strategy's browser-based application and the Strategy desktop user interface. As of Release 20, this widget will open the desktop user interface to the Investor Processing module.
Investor Information	The Investor Information widget is a report widget that displays Investor Loan Counts and Balance Information, includes drill in capability to review loans to one investor.
Investor Reporting Package	The Investor Reporting Package widget is used to generate CREFC Version 8.2 reports for Primary Servicers
IRP Loan Reporting	The IRP Loan Reporting widget tracks the different loan numbers assigned by associated servicers and investors on the loan for IRP reporting.
Job Functions	The Job Function widget is used to create and assign job functions to users. Job Functions and Roles are used to assign Process and Tasks to individuals or groups of individuals. Used in conjunction with the organizational chart, clients are able to define institutional hierarchy and further manage their work loads and service levels using these tools.
Liens	The Liens widget tracks other liens associated with a collateral property. Replaces the Liens tab in the Asset module of Strategy's desktop interface.
Loan Administration	The Loan Administration widget supports single log in integration between Strategy's browser-based application and the Strategy desktop user interface. As of Release 20, this widget will open the desktop user interface to the Escrow Processing module.
Loan Entry	The Loan Entry widget supports single log in integration between the Strategy's browser-based application and the Strategy desktop user interface. As of Release 20, this widget will open the desktop user interface to the Loan Entry module.
Loan Information	Displays Loan Information for selected Super Search Loan Number

Loan Modification	The Loan Modification widget allows users to track historical Loan Modifications. Users can enter each modification with Notes.
Loan Wiring Instructions	The Loan Wiring Instructions widget is used to create wiring instructions at the loan level
Master 2 Maintenance	The Master 2 Maintenance widget provides users with the ability to view and maintain additional asset management information found in PMAST2 File.
Maturing Loans	The Maturing Loan widget displays for active loans with current principal balance > 0 and a
MaTi	MaTi provides authorized users access to Strategy's mapping and upload tool. Users with appropriate authority can perform template driven data uploads and exports.
New Loan Closing	The New Loan Closing widget displays loan, property name and city for all loans that have closed in the last two months. Provides drill in capability to display additional fields and access the Loan Information
Notes	The Notes widget provides view and update access to Notes in the browser-based applications. Web-based Notes can be tied to any area of the system, searched, filtered, feature spell check, and text wrapping. Users can also upload, access and view documents that have been uploaded to Notes.
Occupancy	The Occupancy widget provides access to the historical occupancy information related to a particular property and/or financial statement.
Organizational Chart **Org Chart (All Managers)**	The Organizational Chart provides authorized users access to create a hierarchy to users/job functions within your organization. In conjunction with the Job Function and Organization Chart (Managers) these tools make it possible for better manage task assignments by defining their company with managers and their direct reports.
Other Collateral	Other Collateral is used to track collateral other than real estate historically. The Other Collateral widget replaces the Other Collateral tab in the Other Collateral module in Strategy's desktop application.
Other Collateral - Credit	Other Collateral – Credit tracks letters of credit, replacing the Credit tab in the Other Collateral module in Strategy's desktop application.
Other Collateral - UCC	Other Collateral – UCC is used to track UCCs filings held for loans. This widget replaces the UCC tab in the Other Collateral module in Strategy's desktop application.
Portfolio Analysis	The Portfolio Analysis application provides a super search engine, borrower exposure tracking and a unique view of loan, property and the property's performance and condition. Release 20 and above includes access to the Entity Diagram, a dynamic tool that demonstrates the relationships between loans, investors, guarantors, and properties.

Process & Task Queue	The Process & Task Queue displays open Processes and Tasks. Powerful filters allow the user to display work the way they want to see it. s
Process Manager	Process Manager is Strategy's workflow application. Users with appropriate authorities can view, maintain, and create Processes and their associated tasks.
Process Metrics	Process Metrics displays activity metrics for Process Manager's processes and tasks
Property Valuation	Property Valuatiuon provides access to a tool used in coordination with a Financial Statement to record a Property Valuation based on NOI and Cap Rate.
Rate Cap Monitoring	Rate Cap Monitoring tracks Rate Cap and Hedge Agreements. Working in conjunction with the Intelligence Engine, the Rate Cap Monitoring widget provides a way for users to easily monitor when these agreements come into play and when they need renewals.
Rent Rolls	The Rent Roll application widget tracks historical Rent Roll and Unit Mix information.
Reporting Translation Table	Used in conjunction with the Investor Reporting Package requirements, the Reporting Translation Table users to define the translations for system information codes to CREFC approved values.
Reports	The Reports widget allows users to select from a variety of data groupings to create, save definitions, and export ad hoc data queries.
Risk Rating	A new Risk Rating module allows you to create models to Risk Rate your portfolio.
Rule Alert Widget	The Rule Alert widget displays detailed information when a Strategy Rule is evaluated and fails to meet the assigned requirements. The alert provides loan information, a description of the rule evaluated, and any variable value information used.
Rules Maintenance	Rules Maintenance provides access to the Strategy's Intelligence Engine. Containing over 400 rules touching on various requirements such as insurance compliance, critical dates, and triggers, etc., the Rules Maintenance widget allows authorized users to create and modify rule sets.
RSS Feed	This external web access widget allows users to configure an RSS Feed to provide relevant news and other data on their Strategy Portal.
Security	The Security widget allows authorized users to view and maintain user and group security rights from the Portal. Security will be available from both the Portal and Strategy desktop interfaces.
Service Fee Receivables	Widget to assist with the tracking of non-cashiering Service Fees Receivables
Strategy CS Modules	A container widget, providing all the single sign in integration widgets that open Strategy CS windows from the Portal when

	Single Sign in is activated (Asset, Escrow, Loan Administration, Billing, Investor, Loan Entry, and Transactions).
Strategy Reports	This application generates Strategy reports in PDF and CSV formats.
Syndication Notices	As a part of syndicated lending, the Syndication Notices widget allows users to generate, send, and track syndication notices.
Tools	The Tools widget allows users to complete the User Info for each Strategy User via the Portal. Information from User Info routes emails and displays the User's Name on the screen.
Top Exposures by Property	This Top Exposures wiidget shows the Loan Number, Property Name, and Unpaid Principal Balance by Loan in descending Principal Balance order. Access to detailed Loan Information in Portfolio Analysis.
Transactions	The Transaction widget supports single log in integration between the Strategy's browser-based application and the Strategy desktop user interface. As of Release 20, this widget will open the desktop user interface in the Transaction module.
Trigger Assignment	Widget allowing Maintenance of the Trigger Assignment
Trigger Monitoring Widget	Used to capture Trigger events for monitoring. Includes severity, action 1 and action 2 as well as the Asset Manager and Watchlist.
Trigger Abstract	Widget that captures trigger information at the loan, deal and property level.
Trigger TIG Analyst Widget	Widget notifies analysts of Trigger Abstract setup/review work assigned to their job function or role.
Trigger Escalation	Tracks a trigger event through escalation, noting the Status of the escalation.
TIG Manager Widget	Widget that assigns the setup of new Trigger Abstracts
Utilities	A widget with various utility features such as viewing spooled files, file layouts, and PLOCK management
Vendor Maintenance	This widget allowing maintenance Wiring Instructions for vendors.
Watch List	Monitor internal or Fannie Mae watch list loans. Create a new watchlist workflow or work on existing by loan. This module can also be accessed via the Watch List workflow process
Wires is a Strategy add-on feature, available for a separate charge.	
Wires	A queue widget to review the status of wires
Wire Approval Queue	A Process/Task queue for Outgoing Wire review and Approval
Wire Approval Widget	** This is for Integrated Module only - it will not display on the Dashboard **
Loan Wiring Instructions	This application is used to create wiring instructions at the loan level